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EDITORIAL ANALYSIS

Common Concerns — On India-South Korea Ties

THE HINDU

23 April 2026 · IR · ECONOMY · GS2 · GS3

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 The Hindu

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INTERVIEW ANGLE

"India and South Korea share structural challenges — demographic pressure, semiconductor dependency, China exposure, and defence modernisation needs. Is the India-South Korea CEPA of 2009 being adequately leveraged, and what sectors offer deepest cooperation?"

THE CORE ARGUMENT

India and South Korea are natural partners: both are mid-sized democracies with advanced manufacturing capabilities, facing shared strategic challenges — Chinese military assertiveness, semiconductor supply chain vulnerability, and economic exposure to geopolitical volatility. Yet the India-South Korea relationship has underperformed its potential. The editorial argues for deepening the partnership across **semiconductors and advanced manufacturing, clean energy technology, defence co-production, and people-to-people ties** — moving beyond the underutilised CEPA of 2009 toward a genuinely strategic partnership.

INDIA-SOUTH KOREA BILATERAL — OVERVIEW

Key Indicators

| INDICATOR | FIGURE |
|---|--|
| Diplomatic relations established | 1973 |
| Elevated to “Special Strategic Partnership” | 2015 |
| Bilateral trade (2024-25) | ~\$25-27 billion |
| Indian students in South Korea | ~8,000 |
| Korean companies in India | 600+ (Samsung, Hyundai, LG, Kia, POSCO, Lotte) |
| India-South Korea CEPA | 2009 (goods) + 2015 (services) |
| PM Modi’s Korea visit | 2024 |

Trade Structure

| INDIA EXPORTS TO SOUTH KOREA | INDIA IMPORTS FROM SOUTH KOREA |
|--------------------------------|--------------------------------|
| Mineral fuels, ores, chemicals | Electronics, machinery, steel |
| Pharmaceuticals | Semiconductors, display panels |
| Engineering goods | Petrochemicals |

Problem: India has a **trade deficit** with South Korea (~\$10-12 billion). Korean companies sell high-value electronics and machinery to India but India’s exports to Korea are lower-value commodities.

SHARED STRATEGIC CHALLENGES

1. China Exposure

Both India and South Korea face China as their largest trading partner while also managing territorial/security tensions:

| COUNTRY | CHINA CHALLENGE |
|-------------|---|
| India | Border dispute (LAC); China's support for Pakistan; trade deficit with China |
| South Korea | THAAD missile defence tensions (2017 Chinese economic coercion); North Korea-China axis |

Shared interest: Supply chain diversification away from China-dependent electronics and rare earth minerals.

2. Semiconductor Dependency

| COUNTRY | SEMICONDUCTOR STATUS |
|------------------|---|
| South Korea | World's largest memory semiconductor producer (Samsung, SK Hynix) |
| India | Consumer; building domestic fab capacity (ISMC, Tata Electronics) |
| Shared challenge | Both dependent on TSMC (Taiwan) for advanced logic chips |

Cooperation potential: Samsung and SK Hynix exploring India as a semiconductor packaging and ATMP (Assembly, Testing, Marking, Packaging) location — less advanced than fab but important for supply chain resilience.

3. North Korea — India's Diplomatic Role

India has historical ties with North Korea (established 1973; India recognises DPRK). South Korea values India's potential as a diplomatic channel, though India's influence is limited.

DEFENCE COOPERATION

Existing Cooperation

| PLATFORM | DETAILS |
|--------------------------------------|---|
| K9 Vajra howitzer | South Korea's K9 artillery licensed to India; manufactured by L&T; Indian Army deployed in Ladakh |
| KAMOOV helicopter discussions | South Korea's civilian helicopter; India exploring for Coast Guard |
| Joint exercises | TAEKWONDO — India-South Korea military exercise |

Future Potential

- **LCA Tejas + South Korea:** South Korea studying Tejas for light fighter role
- **Naval cooperation:** South Korea's KDX destroyer design studied by Indian Navy
- **Submarine technology:** DRDO + South Korean Hyundai Heavy Industries collaboration explored

CLEAN ENERGY AND TECHNOLOGY

| SECTOR | POTENTIAL |
|--------------------------------|---|
| Hydrogen | South Korea is investing heavily in hydrogen economy (Hyundai hydrogen trucks, fuel cells); India has National Green Hydrogen Mission |
| Battery storage | Korean battery tech (Samsung SDI, LG Energy Solution) + India's growing EV market |
| Solar manufacturing | India's PLI scheme for solar modules; Korea's expertise in glass, backsheets, encapsulants |
| Nuclear (SMART reactor) | South Korea's small modular reactor (SMART) design — potential for India's nuclear expansion |

PEOPLE-TO-PEOPLE TIES

- **Korean Wave (Hallyu):** K-pop and K-drama popular in Northeast India; Manipur has deepest cultural affinity
- **Indian diaspora in Korea:** Limited (~8,000 students + IT workers)
- **Yoga diplomacy:** India's yoga soft power has traction in South Korea
- **Language:** Korean is India's fastest-growing foreign language choice among young urban students

UPSC ANGLE

| PAPER | ANGLE |
|---------------|--|
| GS2 — IR | India-South Korea CEPA, bilateral relations, semiconductor diplomacy |
| GS3 — Economy | Trade deficit, semiconductor supply chain, Korea's FDI in India |
| GS3 — S&T | K9 Vajra, semiconductor ATMP, hydrogen economy |

Mains Keywords: India-South Korea CEPA 2009, K9 Vajra, Special Strategic Partnership 2015, semiconductor ATMP, THAAD, Hallyu/Korean Wave, hydrogen economy, National Green Hydrogen Mission, supply chain diversification

Probable Question: “India and South Korea share complementary strengths that remain underexploited. Suggest a framework for deepening bilateral cooperation.” (GS2 Mains)

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